

TOAST 2025

1ST Edition of Total Overview
of Alcohol Sector Trends





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The Sip Spectrum

In a world where every sip tells a story, the act of drinking has evolved far beyond mere consumption – It has become a multifaceted expression of self, society, and the spirit of the times. The modern beverage alcohol landscape is no longer defined by tradition alone; it is shaped by a complex spectrum of choices that reflect the intricate tapestry of human experience. From mindful sipping to hedonistic pursuits, from cultural fusion drinks to tech-enhanced experiences, the modern drinking landscape is as varied as it is fascinating.

This spectrum is not static but dynamic. Today's drinkers traverse a fluid continuum influenced by personal values, health considerations, environmental and ethical concerns and evolving societal trends. And curating their drinking experiences with unprecedented nuance.

Understanding this spectrum is crucial for industry professionals, as it goes beyond mere consumption data to reveal the underlying motivations and shifting paradigms of consumer behavior- we uncover not just what's in the glass, but why it's there.

In the 1st edition of the **TOAST 2025 Trends Report**, we harness the insights from our robust Alcohol Consumption Track (ACT) syndicated study to uncover trends on how Americans and Canadians will design their drinking rituals across an ever-evolving landscape.

Macro Trends

Conscious Curation – From zero-proof to high-ABV, sustainable to indulgent, global to hyper-local –navigate how the expanding spectrum of alcohol choices is empowering consumers to curate their drinking experiences to their mood, values, and context.

Identity Infusion – Uncover the rich tapestry of generational, cultural, and gender perspectives, transforming drinking into a reflection of values, heritage and individuality. It's not just about what people drink—it's about what their choices say about who they are.

Occasion Fluidity – The new drinking occasion is not defined by time or place – it's defined by vibe. Learn how the boundaries between drinking occasions are blending, creating a spectrum of fluid, vibrant, and less formal imbibing moments that cater to evolving lifestyles.

Access Evolution – Witness how the expanding spectrum of retail environments is influencing consumer choices, from traditional outlets to emerging digital platforms, reshaping the way we discover and purchase alcohol. Convenience, personalization, and storytelling are key.

Category Deep Dives

Within this segment, we delve into strong consumer segments, consumption dynamics, functional and emotional need states, venue dynamics, prominent food consumed, sub-segment analysis and purchasing habits for each of the BevAlc categories, including

- Beer
- Wine
- Spirits
- Cider/ RTDs/ Hard Seltzers
- Zero-Proof Beverages



Main Report Sources

Ipsos Alcohol Consumption Tracker – The Alcohol Consumption Tracker (ACT) is an online consumption diary that offers a detailed and nuanced understanding of alcohol consumption behaviors amongst in USA and Canada, since 2012. ACT tracks over 25,000 drinkers annually in each market and covers consumption across all alcohol categories and non-alcohol substitutes, in both on premise and residential channels. By continuously tracking consumer habits, ACT provides invaluable data on what consumers drink, where and when they consume alcohol, their motivations for drinking, and their social contexts. This data is supplemented by insights into their shopping experiences, lifestyle choices, and attitudes and perception towards alcohol.

Ipsos FIVE – FIVE is a daily online diary capturing everything Canadians ate and drank yesterday across all categories, brands, all dayparts and all venues (including out of home channels). We also track situational dynamics, item preparation, motivations, health statuses, lifestyle habits and purchase dynamics driving item choice. The study is a strategic targeting tool launched in 2013 that provides an unparalleled view of consumption among 23,000 individuals annually aged 2+ years.

Ipsos Foodservice Monitor (FSM) – FSM is an on-going daily market measurement tool detailing what individual consumers purchased from all foodservice channels (e.g., Quick-Service Restaurants, Full-Service Restaurants and Home Meal Replacement Retail channels) yesterday. It captures detail related to industry size and channels, visit details, party dynamics, menu choice and

demographics among other metrics. FSM tracks over 35,000 individuals annually and links consumer needs with behaviour to offer a 360 degree look at the commercial foodservice experience in Canada.

Timelines and Deliverables

Webinar Date: September 23, 2025

Report Release Date: October 3, 2025

TOAST 2025 Deliverables Include: Resource PowerPoint report in PDF format (approximately 85-90 slides) accompanied by a live one-hour presentation report with some customization (as agreed upon). Additional hours for follow-ups and further queries available upon request.

2025 Packages

Single Country Report	
ACT Subscribers	Complimentary
ACT Non-Subscribers	
Standard Package	\$25,000 USD/ \$35, 000 CAD
Early Bird Package ¹	\$19,750 USD/ \$27, 500 CAD

¹Discounted pricing available on request for a Total North American Report.

Early bird discount package is available until September 30th, 2025

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